


The following outlines some of the balancing aids and scheduling tips to assist with the creation of schedules within Clairvia CVM.

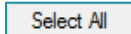
## Creating a Filter

Creating a filter can assist users with the process of balancing a schedule. The following steps outline the process for creating a filter in Clairvia CVM .

**STEP 1:** Click the Filter Set-Up Icon.

- The Display Filter window opens.

**STEP 2:** From the Employee Tab of the Display Filter window, click the Select All button.



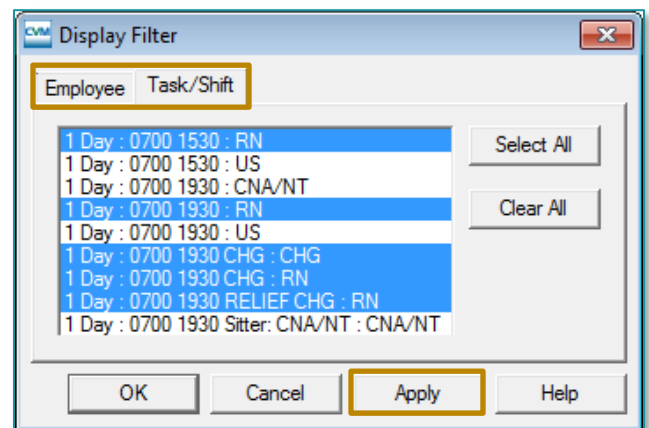
**STEP 3:** From the Task/Shift Tab, select the shift(s) that require balancing.

**STEP 4:** Click Apply.

**STEP 5:** Click OK.

**STEP 6:** Click the Display Filter Icon. 

- All rows not selected as part of the filter will be hidden.



**NOTE:** Filters cannot be saved for future use. The last filter created will be the one that is saved.

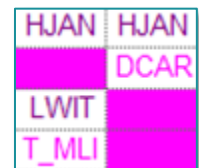
## Identifying Holes

The Holes Icon can also be used along with the filter for easy identification of holes within the schedule.

**STEP 1:** Click the Hide Empty Rows icon. 

**STEP 2:** Click the Show Holes Icon. 

- All empty holes on the schedule will display in a bright pink color.



**TIP:** Try not to leave gaps when creating the schedule so that your holes are at the bottom of the list. This will be especially important if you have extra rows for that shift.

1 Day	0600 1530 CHG : RN	1	MDAY	MDAY		
1 Day	0630 1900 RELIEF CHG : RN	1			KNALE	KNALE

**Reminder:** Some holes are appropriate e.g. Charge Nurse Holes. These would be filled by Relief Charge, so viewing those two lines together the holes would align with another name in the opposite.

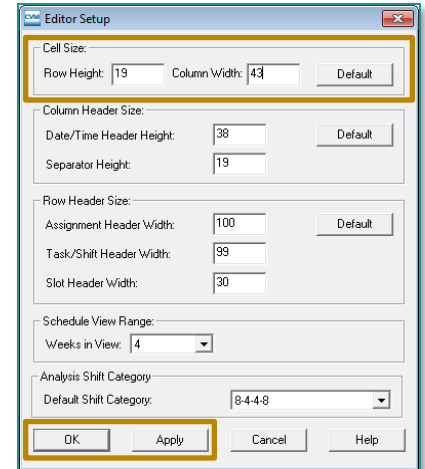
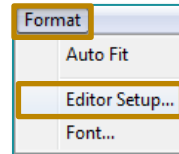
## Changing Column Width

It may be helpful during balancing to view the entire schedule period. This can be accomplished by changing the column width.

**STEP 1:** Click **Format**, then click **Editor Setup**.

**STEP 2:** Change column width to a width that meets your viewing needs.

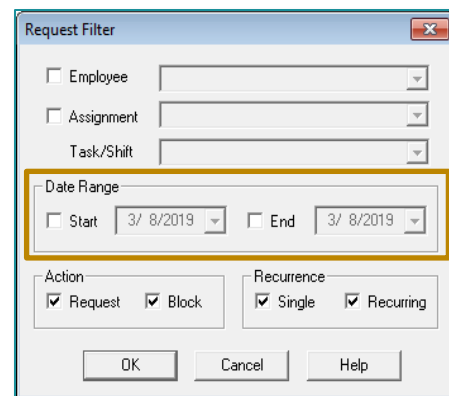
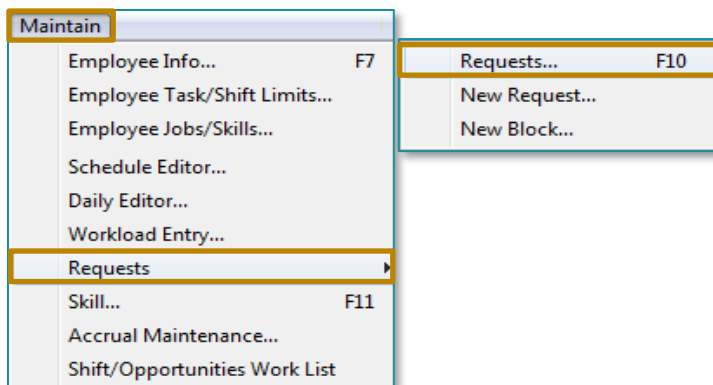
**STEP 3:** Shrink the size of the **Assignment** and **Shift** to increase the daily view.



## Denying Requests After Balancing

Once the schedule has been balanced, any staff whose requested shift was not used in the schedule, will need their requested shift denied. This can easily be accomplished by following the steps outlined below.

**STEP 1:** Click **Maintain**, then click **Requests**.



**STEP 2:** Click the **Filter** button.

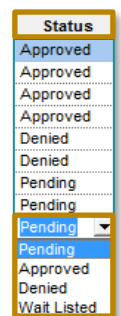
**STEP 3:** Select the desired **Start** and **End Dates**.

**STEP 4:** Click **OK**.

**STEP 5:** Double-click the **Status** header.

- **Status Type** will be sorted in alphabetical order. **Pending Requests** will be moved to the bottom of the list.

**STEP 6:** Click in the **Pending Status** box of the request that you would like to deny and change the dropdown to **Denied**.



**NOTE:** To deny multiple Pending Requests on this list, select the Pending Status box of the first request. Type "D" from the keyboard. The dropdown will automatically change to Denied. Use the down arrow on the keyboard to go to the next request and complete the denial process.

**STEP 7:** Click **Apply**.

**STEP 8:** Click **OK**.

**NOTE:** Once the Schedule has been balanced, the remaining Pending Requests should be Denied so they no longer show as still Pending Approval from the Employee View in Clairvia Web.

## Printing the Schedule

The number of pages included in the print can be decreased by changing the printer settings as outlined in the following steps.



**STEP 1:** Click the **Hide Empty Rows** icon.

**STEP 2:** On the **Schedule Editor Page**, click **File**, then click **Page Setup**.

**STEP 3:** In the **Scaling** section, set **Adjust to 85% normal size**, then click **OK**.

**STEP 4:** Click **File**, then **Print Set Up**.

**STEP 5:** Change **Paper Size** to **Legal** and **Orientation** to **Landscape**, then click **OK**.

**STEP 6:** Click **File**, then **Print**.

**STEP 7:** Enter the date range of the schedule to be printed and click **OK**.

**STEP 8:** This opens the **Print** window.

- If needed, make adjustment(s) to the **Printer**, **Print Range** or **Number of copies**.

**STEP 9:** Click **OK**.

**NOTE:** If you have adjusted the column width of your schedule, you may need to change the settings for the print job to ensure the staff can identify their time on the schedule.

